

81 02236

THE VISITOR IN MARIN



THE

THE POTENTIAL FOR VISITOR ENTERPRISE

● BY:

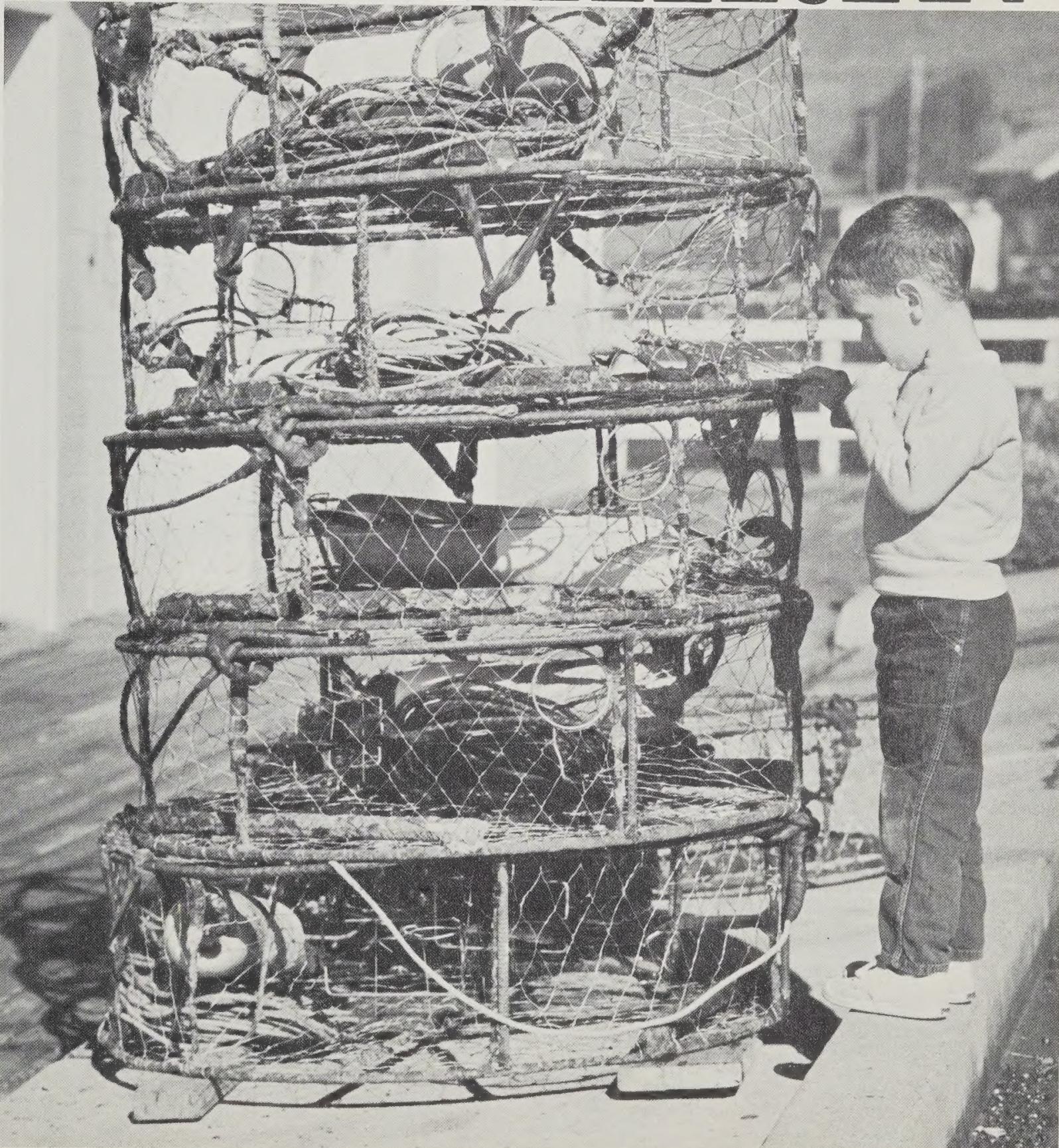
- THE MARIN CITY-COUNTY PLANNING COUNCIL
VISITOR ENTERPRISE AND ECONOMIC
DEVELOPMENT SUBCOMMITTEE
- ECONOMICS RESEARCH ASSOCIATES
- MARIN COUNTY PLANNING DEPARTMENT



VISITOR IN MARIN

DEVELOPMENT IN MARIN

The preparation of this report was financed in part through an urban planning grant from the Department of Housing and Urban Development, under the provisions of Section 701 of the Housing Act of 1954, as amended, and through the auspices of the Council on Intergovernmental Relations, State of California.



CONTENTS

PREFACE	2
INTRODUCTION	4
SUMMARY OF FINDINGS AND RECOMMENDATIONS BY ECONOMICS RESEARCH ASSOCIATES	6
ECONOMICS RESEARCH ASSOCIATES RECOMMENDATIONS FOR FUTURE POLICY	9
THE WEEKEND VISITOR TO MARIN 1969-1970	18
RECOMMENDATIONS OF THE CITY-COUNTY PLANNING COUNCIL	21
RECOMMENDATIONS OF THE VISITOR ENTERPRISE AND ECONOMIC DEVELOPMENT COMMITTEE	21
PLANNING STAFF RECOMMENDATIONS FOR ACHIEVEMENT OF VISITOR ENTERPRISE GOALS	22
APPENDIX 1	29
APPENDIX 2	30
TABLE 1	9
FIGURE 1	11
FIGURE 2	25
FIGURE 3	31





PREFACE

As any Marinite knows, and as do many of our neighbors in the Bay Area, this county of ours has a God-given combination of hill and dale, forest and glen, ocean, lake and stream that is attractive to live amongst, and, to visit.

It is the visit part with which this study concerns itself. We have no dearth of visitors who come here to partake briefly of our legacy of nature's largesse. The briefness of it is a problem, and an opportunity. An opportunity in two ways that are complimentary and advantageous.

It is a fact of life that Marin will continue to grow; equally so will our number of visitors who are overwhelmingly of the one-day very limited expenditure variety. The kind of better money extracting facilities recommended in the study, can, under appropriate guidelines and zoning regulations, preserve and potentially enhance those environ-

mental qualities that mean so much to us. This is particularly so when one contemplates the inevitable population pressures in the years to come.

The study was initiated by the City-County Planning Council as a more informed means of evaluating the visitor-enterprise potential in Marin as well as kinds of facilities and land space needed as a component in a general plan for the county. No prior such information and guidance was available.

It is hoped that this summary arouses its readers' greater curiosity and a delving into the full report.

.. The Visitor Enterprise and Economic Development Subcommittee of the City-County Planning Council



INTRODUCTION

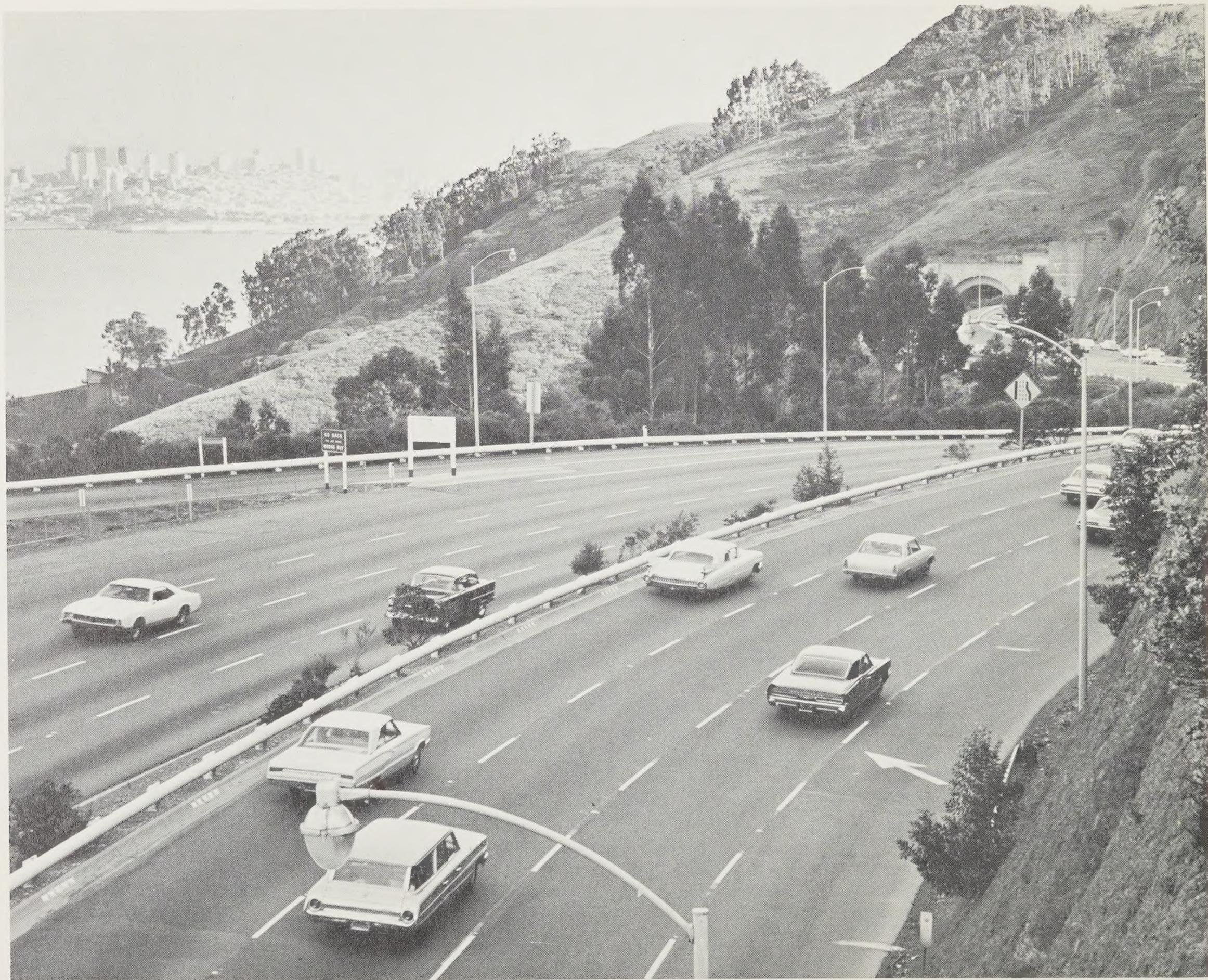
MARIN COUNTY BEGINS AS THE SCENIC BACKDROP TO THE FAMED GOLDEN GATE BRIDGE AND GOES ON TO REVEAL TO EVEN THE MOST EXPERIENCED TRAVELER A DISPLAY OF NATURAL BEAUTY UNSURPASSED ANYWHERE. THE 521 SQUARE MILE PENINSULA HAS TOWNS LIKE SAUSALITO AND TIBURON WHICH RIVAL THE FRENCH RIVIERA OR PORTOFINO FOR WATERFRONT CHARM AND INTEREST. THERE ARE THE OCEAN CLIFFS AND BEACHES OF THE NATIONAL SEASHORE WHICH ARE UNLIKE ANYPLACE ELSE. TOMALES BAY HAS BEEN LIKENED TO THE SCOTCH LAKES AND GLENS. NICASIO RETAINS THE FLAVOR OF THE OLD WEST. MUIR WOODS NATIONAL MONUMENT AND SAMUEL P. TAYLOR PARK ARE COMPACT SAMPLES OF THE GRANDEUR OF THE REDWOOD GROVES TO THE NORTH. MOUNT TAMALPAIS IS STILL THE WILDERNESS BELOVED BY JOHN MUIR, BUT WITH VIEWS OF THE WHITE TOWERS OF SAN FRANCISCO. MILL VALLEY NESTLES UNDER ITS FORESTED HILLS LIKE AN OLD ENGLISH MARKET TOWN. HERE THEN IS A PLACE THAT DID NOT GET BULLDOZED UNDER IN THE FRANTIC SUBURBAN SURGE OF THE 50'S AND 60'S, YET IT IS WITHIN COMMUTING RANGE OF SAN FRANCISCO AND OAKLAND'S FRANTIC URBAN CENTERS.

THEREIN LIES A PROBLEM FOR A VISIT TO MARIN HAS BECOME A FAVORITE ONE DAY EXCURSION FOR BAY AREA RESIDENTS AND TOURISTS ALIKE. THE RAPIDLY RISING NUMBER OF SUCH VISITS ENTAILS FINANCIAL AND ENVIRONMENTAL COSTS TO MARIN THROUGH TRAFFIC CONGESTION, POLICING, LITTERING, AND OVERCROWDING OF THE VISITOR DESTINATIONS THEMSELVES.

MUCH DISCUSSED BUT NEVER REALLY EXAMINED WAS THE QUESTION OF WHETHER THERE IS A POTENTIAL FOR DEVELOPING A FORM OF VISITOR ENTERPRISE WHICH WOULD OFFSET SOME OF THESE COSTS. THE PURPOSE OF THE VISITOR ENTERPRISE STUDY WAS TO SEEK OUT A MEANS WITHIN THE CONTEXT OF THE COUNTY-WIDE PLANNING PROGRAM, FOR TURNING THIS INEVITABLE TIDE OF VISITATION IN TO SOME BENEFIT TO THE ECONOMY AND ENVIRONMENT OF THIS VERY UNIQUE PENINSULA.

TO THIS END ECONOMICS RESEARCH ASSOCIATES, CONSULTANTS IN THE SPECIALIZED FIELD OF VISITOR ENTERPRISE DEVELOPMENT WERE EMPLOYED TO COUNSEL THE CITY-COUNTY PLANNING COUNCIL OF MARIN IN FINDING WHETHER A BENEFICIAL POTENTIAL EXISTED AND IF SO, WHAT APPROACH SHOULD BE USED TO REALIZE IT. IN THIS ENDEAVOR THEY WERE ASSISTED BY THE MARIN COUNTY PLANNING DEPARTMENT AND GUIDED BY A CITIZENS SUBCOMMITTEE ON VISITOR ENTERPRISE AND ECONOMIC DEVELOPMENT. THIS REPORT SUMMARIZED THE FINDINGS AND RECOMMENDATIONS OF THE CONSULTANTS, THE SUBCOMMITTEE, AND THE PLANNING STAFF.

THESE STATEMENTS ARE OFFERED AS RECOMMENDATIONS TO THE CITY-COUNTY PLANNING COUNCIL, THE CITY COUNCILS, AND THE BOARD OF SUPERVISORS OF MARIN, AND MOST OF ALL THE CITIZENS OF MARIN.



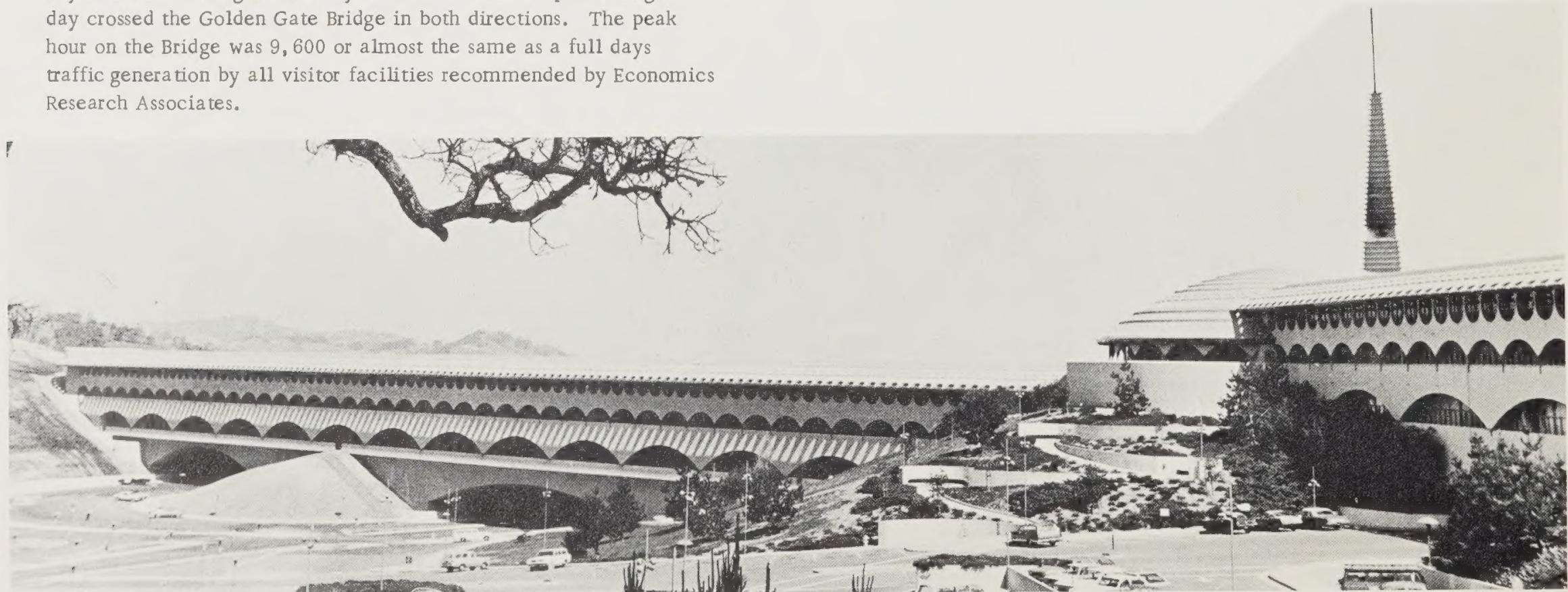
MARIN IS WITHIN COMMUTING RANGE OF SAN FRANCISCO'S HIVES OF COMMERCE

SUMMARY OF FINDINGS AND RECOMMENDATIONS BY ECONOMICS RESEARCH ASSOCIATES

- MARIN COUNTY'S CURRENT VISITOR POPULATION IS CHIEFLY COMPOSED OF DAY VISITORS WHO SPEND LESS THAN \$10.00 PER TRIP (89% OF THE TOTAL).
- MOST OF THESE VISITORS COME FROM SAN FRANCISCO AND MARIN ITSELF. SAN MATEO AND EAST BAY COUNTY RESIDENTS MAKE UP MOST OF THE BALANCE.
- MARIN RECEIVES ABOUT 20 TO 25% OF THE DAY TRIPS IN THE BAY AREA, BUT HOSTS ONLY ABOUT 1 TO 3% OF THE OVERNIGHT TRIPS.
- IN 1970 MARIN'S PUBLIC PARKS AND RECREATIONAL AREAS SERVED OVER 3 1/2 MILLION DAY VISITORS.
- VISITORS TO SAUSALITO AND TIBURON FREQUENTLY DINE OUT AND SHOP.
- RESORT HOTEL DEVELOPMENT IS CONSIDERED ONE OF THE MOST PROMISING VISITOR ENTERPRISES FOR THE COUNTY.
- WEST MARIN SHOULD BE EXPECTED TO HAVE 2,000 TO 2,500 OF THE 3,000 NEW RESORT HOTEL ROOMS, BECAUSE IT'S ATMOSPHERE IS HIGHLY APPROPRIATE FOR THE CONFERENCE CENTER BUSINESS WHICH WILL PROVIDE THE ESSENTIAL OFF-SEASON SUPPORT FOR THESE RESORT MOTELS. IF IN-PARK CONCESSIONS ARE PRECLUDED FROM THE NATIONAL SEASHORE, VISITOR AND RESORT DEVELOPMENT SHOULD CENTER AROUND TOMALES BAY AND OLEMA.
- IT IS ESTIMATED THAT SUFFICIENT ECONOMIC SUPPORT WILL EXIST IN MARIN FOR 3,000 NEW HOTEL ROOMS AND 1,000 MORE RECREATIONAL VEHICLE SPACES BY 1990.
- THE LIMITING FACTOR TO THIS KIND OF EXPANSION WILL BE THE AMOUNT OF OFF-SEASON BUSINESS COMING FROM BUSINESS MEETINGS, CONFERENCES AND SMALL CONVENTIONS.
- REALIZATION OF THIS POTENTIAL WILL MEAN THAT MARIN WOULD CAPTURE 10 TO 15 PERCENT OF THE PROJECTED BAY AREA OVERNIGHT VISITOR MARKET BY 1990.
- ABOUT 2,000 ADDITIONAL BOAT SLIPS ARE PROJECTED BY 1990 FOR MARIN, MOSTLY ON SOUTHERN BAY FRONT LOCATIONS.
- FOUR ADDITIONAL GOLF COURSES, CONNECTED WITH THE RESORT AREAS, ARE CONSIDERED FEASIBLE.
- SPECIAL EVENTS AND ATTRACTIONS LIKE THE CIVIC CENTER FACILITIES, THE RENAISSANCE PLEASURE FAIRE AS WELL AS RESTAURANTS AND OTHER SHORT STAY ATTRACTIONS CAN HELP TO MAXIMIZE THE POTENTIAL ECONOMIC BENEFITS TO THE COUNTY FROM VISITATION.

- DEVELOPMENT OF EVERYTHING ECONOMICALLY FEASIBLE WOULD DRAW A MAXIMUM OF 10,850* ADDITIONAL AUTOS PER DAY INTO THE COUNTY WITH A PEAK HOUR OF 2,710 VEHICLES.
- THE ENTIRE TRAFFIC LOAD WHICH WOULD BE GENERATED BY THE NEW VISITOR ENTERPRISES COULD BE HANDLED BY ONLY TWO LANES IN EACH DIRECTION AND THAT THE EXISTING HIGHWAYS BRINGING VISITORS INTO THE COUNTY ARE ADEQUATE TO HANDLE THE EXPECTED VEHICLE FLOW, ESPECIALLY SINCE THE TRAFFIC WILL IN REALITY BE DESTINED FOR ATTRACTIONS ALL OVER THE COUNTY, WHILE TABLE I'S ESTIMATES ASSUME ALL THE TRAFFIC ON ONE ROUTE. THEREFORE, THE CONCLUSION IS THAT THE RECOMMENDED VISITOR ENTERPRISE DEVELOPMENTS WILL NOT ADD A SUFFICIENT VOLUME OF TRAFFIC TO JUSTIFY ANY MAJOR ROAD IMPROVEMENTS. IN FACT LARGER VEHICLE CAPACITY WILL ONLY ENCOURAGE MORE ONE DAY VISITORS.
- NEW HIGHWAY CONSTRUCTION WILL INFLUENCE THE MARKET FROM WHICH MARIN COUNTY DRAWS. IMPROVEMENTS IN THE GOLDEN GATE BRIDGE WILL ENCOURAGE MORE VISITING FROM SAN FRANCISCO AND THE PENINSULA. EAST-WEST HIGHWAY IMPROVEMENTS WILL MAKE IT EASIER FOR RESIDENTS FROM EASTERN MARIN AND THE SACRAMENTO VALLEY TO VISIT WEST MARIN.
- IF TRAFFIC CONGESTION CONTINUES, WILL MARIN BE ABLE TO ATTRACT RESORT PATRONS TO REPLACE ONE DAY VISITORS? THE ANSWER IS YES, BECAUSE OVERNIGHT VISITORS TYPICALLY TRAVEL AT DIFFERENT TIMES FROM DAY VISITORS THEREBY AVOIDING PEAK CONGESTION. FOR SOME WEEKENDERS RETURNING TO SAN FRANCISCO, FOR EXAMPLE, ON SUNDAY NIGHTS, WILL ENCOUNTER CONGESTION; A PROBLEM WHICH HAS NOT DETERRED VISITS TO LAKE TAHOE.

* For reference West Marin itself generated 32,100 vehicle trips per day in 1969. During the same year 87,000 vehicles per average day crossed the Golden Gate Bridge in both directions. The peak hour on the Bridge was 9,600 or almost the same as a full days traffic generation by all visitor facilities recommended by Economics Research Associates.



ATTRACTIONS LIKE THE CIVIC CENTER CAN HELP TO MAXIMIZE THE POTENTIAL ECONOMIC BENEFIT FROM VISITATION



IMPROVEMENTS IN THE GOLDEN GATE BRIDGE WILL ENCOURAGE MORE
VISITORS FROM SAN FRANCISCO AND THE PENINSULA

ECONOMICS RESEARCH ASSOCIATES

FUTURE POLICY RECOMMENDATIONS

	NEGATIVE POLICY	NEUTRAL POLICY	POSITIVE POLICY
NEW FACILITIES ASSUMED			
Motels and Resorts (rooms)	--	400	3,000
Overnight Campgrounds (spaces) ¹	--	100	1,000
Recreation:			
Marinas (slips)	--	500	2,000
Golf Courses (holes)	--	18	72
Miscellaneous	--	--	--
Restaurants (seats)	2,500	3,900	14,600
Stores and Shops (square feet)	40,000	46,250	141,250
Gas Stations	7	8	27
NEW CONSTRUCTION (MILLIONS OF DOLLARS)			
Motels and Resorts	--	\$ 4.0	\$30.0
Overnight Campgrounds	--	0.4	3.5
Recreation:			
Marinas	--	0.8	3.0
Golf Courses	--	0.2	0.8
Miscellaneous	--	--	2.0
Restaurants	\$3.0	4.7	17.5
Stores and Shops	1.0	1.2	3.5
Gas Stations	0.7	0.7	2.5
Total	\$4.7	\$12.0	\$62.8
PROJECTED ADDITIONS TO ANNUAL RETAIL SALES BY CATEGORY (MILLIONS OF DOLLARS)			
Motels and Resorts	--	\$ 2.8	\$21.4
Overnight Campgrounds	--	0.1	0.9
Recreation:			
Existing Attractions	\$2.6	2.5	2.5
New Marinas	--	0.8	3.3
New Golf Courses	--	0.2	1.0
Miscellaneous New Attractions	--	--	2.0
Restaurants	5.0	7.8	29.2
Stores and Shops	3.2	3.7	11.3
Gas Stations	1.3	1.4	4.8
Total	\$12.0	\$19.3	\$76.4

1

For recreational vehicles

Source: Economics Research Associates

THE MOST FAVORABLE ECONOMIC IMPACT FROM VISITOR ENTERPRISE DEVELOPMENT WOULD OCCUR IF MARIN WERE TO ADOPT A POSITIVE POLICY LEADING TO DEVELOPMENT OF THE FULL POTENTIAL OF NEW ENTERPRISES (3,000 HOTEL ROOMS, 2,000 BOAT SLIPS, ETC.). ALTERNATIVE POLICIES ARE A NEGATIVE POLICY WHICH DISCOURSES FURTHER DEVELOPMENT THROUGH ZONING AND OTHER PROHIBITIVE MEASURES AND, A NEUTRAL POLICY, WHICH WOULD ALLOW VISITOR ENTERPRISES ON A MORE OR LESS SPONTANEOUS BASIS. THE ECONOMIC IMPACT OF EACH KIND OF POLICY IS SHOWN. (TABLE I)

THE ANNUAL NET CONTRIBUTION TO THE COUNTY AFTER TAXES AND COSTS HAVE BEEN ESTIMATED FOR EACH POLICY ARE:

NEGATIVE POLICY	\$ 86,300 LOSS
NEUTRAL POLICY	\$ 362,500 GAIN
POSITIVE POLICY	\$2,260,100 GAIN

● THE RECOMMENDATION TO ADOPT THE POSITIVE POLICY IS
BASED ON FIVE PREMISES:

- 1** IT DOES NOT APPEAR THAT ANY POLICY THAT MARIN COUNTY COULD ADOPT WILL REDUCE THE NUMBER OF VISITORS TO THE COUNTY OR MATERIALLY DECREASE CONGESTION.
- 2** VISITOR ENTERPRISES COULD PROVIDE NEEDED PROPERTY TAX RELIEF.
- 3** VISITOR ENTERPRISES COULD GENERATE BASIC EMPLOYMENT.
- 4** VISITOR ENTERPRISES ARE A FORM OF DEVELOPMENT WHICH COULD CAPITALIZE ON THE SUPERIOR NATURAL ENVIRONMENT OF MARIN COUNTY, AND MAKE IT AVAILABLE TO THE PUBLIC FOR OUTDOOR RECREATION IN A USEABLE FORM.
- 5** THE MARINAS, CAMPGROUNDS, RESTAURANTS, AMUSEMENTS, AND SHOPS WHICH WILL BE SUPPORTED BY VISITORS WILL ALSO BE AVAILABLE FOR THE BENEFIT OF MARIN COUNTY RESIDENTS.



IT DOES NOT APPEAR THAT ANY POLICY MARIN COUNTY COULD ADOPT
WOULD REDUCE THE NUMBER OF VISITORS TO THE COUNTY

DEVELOPMENT ZONES FOR NEW VISITOR ENTERPRISES IN MARIN COUNTY

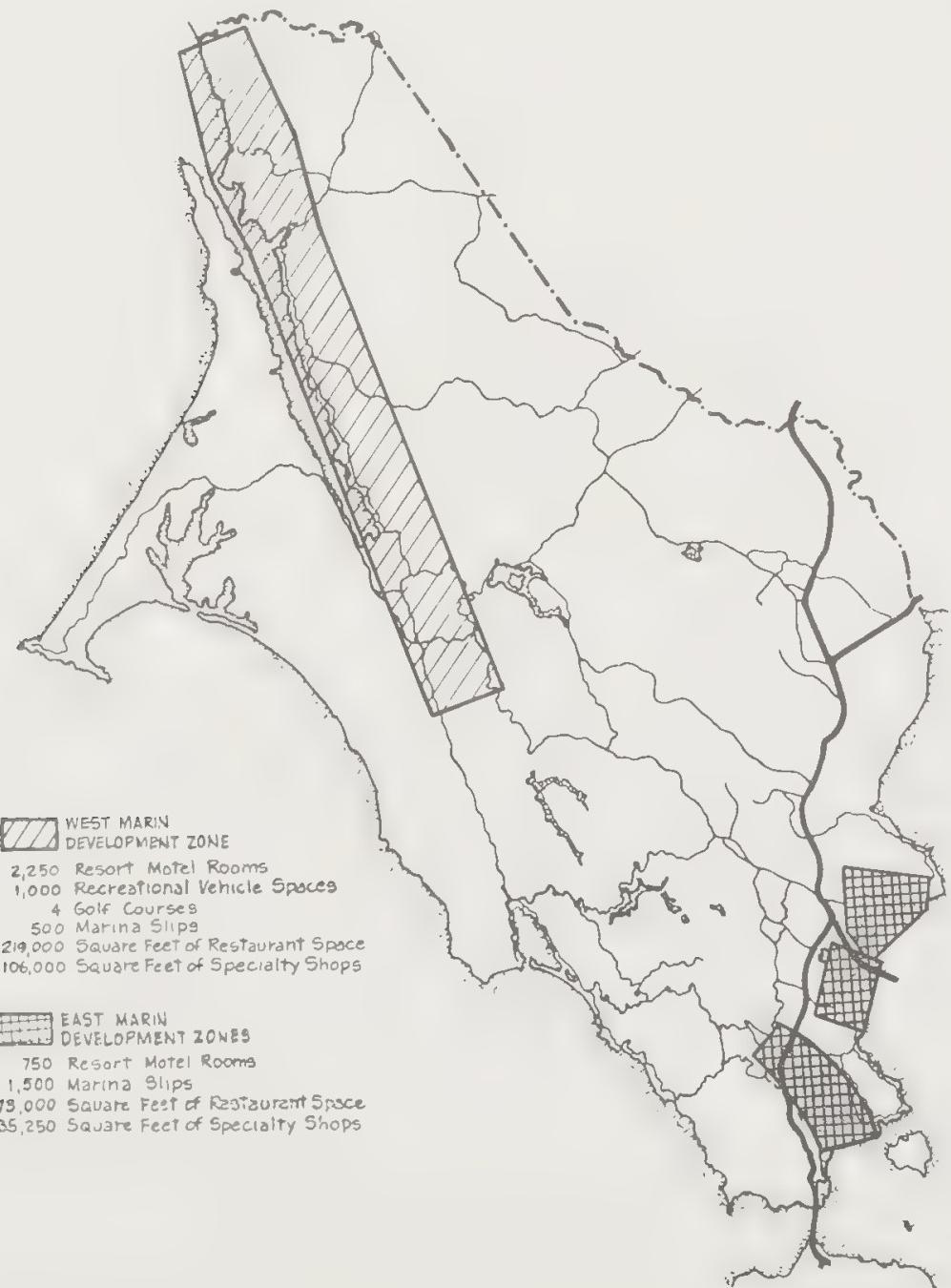


figure 1

Source: Economics Research Associates

A TOTAL NEED OF 1,200 ACRES IS PROJECTED FOR VISITOR ENTERPRISES, 1,100 OF WHICH WILL BE NEEDED IN WEST MARIN. GOLF COURSES WOULD REQUIRE 520 OF THESE ACRES AND RESORT MOTEL DEVELOPMENT IS PREDICTED ON A DENSITY LOW ENOUGH TO AVOID DISRUPTION OF THE NATURAL SURROUNDINGS AS MUCH AS POSSIBLE (SEE APPENDIX I).

SUCCESSFUL DEVELOPMENT OF VISITOR ENTERPRISES SHOULD INCLUDE AN APPROPRIATE LEVEL OF RESIDENTIAL DEVELOPMENT NEARBY FOR THE WORK FORCE INVOLVED IN THESE ENTERPRISES.

FIGURE 1 SHOWS RECOMMENDED DEVELOPMENT ZONES FOR FACILITIES JUDGED ECONOMICALLY FEASIBLE FOR MARIN COUNTY. THEY ARE LOCATED ON RICHARDSON BAY AND SAN PABLO STRAIT IN EAST MARIN WHERE MARINA DEVELOPMENT WOULD BE THE KEY INGREDIENT. IN WEST MARIN THEY ARE LOCATED OUTSIDE THE NATIONAL SEASHORE AROUND TOMALES BAY AND OLEMA-POINT REYES STATION ON THE ASSUMPTION THAT THE INTERIOR OF THE SEASHORE WILL BE LEFT COMPLETELY NATURAL.

SOME OF THE CONCEPTS ON WHICH THE WEST MARIN PLAN WAS BASED REQUIRE MODIFICATION IF THE POSITIVE TOURISM POLICY IS TO BE FOLLOWED. THEY ARE:

- 1** THE LAND RESERVE FOR VISITOR ENTERPRISES MUST BE APPROXIMATELY DOUBLED (FROM 525 ACRES TO 1,000).
- 2** THE WEST MARIN PLAN CALLS FOR APPROXIMATELY 95% UTILIZATION OF THE PLANNING AREA BY RESIDENTIAL HOUSING. IN ALL PROBABILITY, TYPICAL SUBURBAN RESIDENTIAL DEVELOPMENT WOULD DESTROY THE MAJOR CHARACTERISTIC WHICH FORMS THE BASIS FOR DEMAND--THE RECREATIONAL ENVIRONMENT. ALL NECESSARY RESIDENTIAL DEVELOPMENT IN THE AREA MUST CONFORM TO THIS ENVIRONMENT IF IT IS TO SURVIVE AS A DESTINATION AREA.



3 THE WEST MARIN PLAN PROPOSES A NUMBER OF FACILITIES WHICH WOULD ENCOURAGE DAY USE VISITS. GROWTH SHOULD BE REDIRECTED TO BALANCE THAT TYPE OF VISITING WITH LONGER STAY AND MORE COMMERCIALLY ORIENTED TOURISM.

4 WHILE EARTHQUAKE PROBLEMS HAVE NOT PROVED TO BE A DETERRENT TO ATTRACTING INVESTORS IN OTHER PARTS OF THE STATE, SHOULD A CLEAR ZONE BE ESTABLISHED ALONG THE SAN ANDREAS FAULT, IT WOULD HAVE THE SAME EFFECT AS PROVIDING OPEN SPACE AND WOULD ENHANCE RESORT DEVELOPMENT IN THE NEARBY "SAFE" ZONE.

VISITOR ENTERPRISES COULD CAPITALIZE ON THE SUPERIOR NATURAL ENVIRONMENT OF MARIN COUNTY



- A SOLUTION TO THE PROBLEM OF INITIATING PRIVATE DEVELOPMENT WOULD BE TO HAVE THE PLANNING DEPARTMENT INTERPRET THE ABSTRACT MASTER PLAN INTO A GROUP OF SPECIFIC PROJECTS. THIS WOULD MEAN MASTER PLANNING FOR RESORT DEVELOPMENT, BUT NOT ZONING THE AREA UNTIL REQUESTED TO DO SO BY A PROSPECTIVE DEVELOPER.

IN VIEW OF THE RESTRICTIONS IMPOSED, EVEN A GOOD SOLICITATION PROGRAM WOULD NOT ASSURE THAT INVESTORS WOULD BE FOUND FOR A PROJECT.

HOWEVER THERE IS EVERY REASON TO BELIEVE THAT INVESTOR RESPONSE TO A SOLICITATION PROGRAM WOULD BE GOOD IN VIEW OF MARIN'S LOCATIONAL ADVANTAGE IN OFFERING THE REQUIRED NATURAL RESOURCES IN CLOSE PROXIMITY TO A READY MADE MARKET.

- GOVERNMENT INITIATED DEVELOPMENT PROGRAMS LIKE THAT USED IN SAN DIEGO'S MISSION BAY OR LOS ANGELES' MARINA DEL REY MIGHT BE CONSIDERED IN RESPONSE TO A SOLICITATION PROGRAM THAT PROVES UNFAVORABLE.

- DENSITY IN RESORT DEVELOPMENT MAY HAVE TO BE HIGHER THAN OTHERWISE DESIRED BECAUSE OF RELATIVELY HIGH LAND COSTS IN MARIN UNLESS THE COUNTY IS WILLING TO UNDERWRITE THE COST OF PROVIDING OPEN SPACE.

- IT IS NOT POSSIBLE TO SOLVE WATER AND SEWER PROBLEMS FOR A SMALL RESORT COMPLEX ALONE AND SOME SORT OF SECOND HOME DEVELOPMENT MAY BE NECESSARY TO DEFRAY

- THE COST OF NEEDED SYSTEMS. THIS, HOWEVER, DOES NOT MEAN THAT RESORT DEVELOPMENT IN MARIN IS UNFEASIBLE WITHOUT ASSOCIATED RESIDENTIAL DEVELOPMENT. THE KEY THING IS WHETHER OR NOT THERE ARE SUPERIOR RESOURCES FOR OUTDOOR RECREATION PRESENT.

- THE MOST AUSPICIOUS BEGINNING MIGHT BE MADE WITH A DEL MONTE LODGE TYPE RESORT COMPLEX OF SEVERAL HUNDRED ROOMS IN THE WEST MARIN AREA. THIS FIRST COMPLEX MUST BE LARGE ENOUGH TO BE SELF SUPPORTING. ONCE THIS COMPLEX HAS HAD SUFFICIENT TIME TO BECOME ESTABLISHED, DEVELOPMENT CAN START ELSEWHERE.

- IT IS STRONGLY RECOMMENDED THAT THE COUNTY CHAMBER OF COMMERCE ACT AS A PERMANENT ADVISORY BOARD WITH WHOM PROSPECTIVE INVESTORS COULD CONSULT. THIS GROUP WOULD THEN ACT AS LAISON BETWEEN PUBLIC AGENCIES AND THESE INVESTORS.

- THE ADVISORY BOARD SHOULD BE ACTIVE IN LOCATING PROSPECTIVE INVESTORS AND COMMUNICATING TO THEM THE POTENTIAL THAT EXISTS IN MARIN. TO UNDERTAKE THIS FUNCTION IT IS STRONGLY RECOMMENDED THAT THE COUNTY'S PORTION OF THE BED TAX BE EARMARKED FOR FUNDING SUCH OPERATIONS BY THE COUNTY CHAMBER OF COMMERCE.

- IT IS ALSO ESSENTIAL THAT THE CHAMBER BE INDEPENDENT OF GOVERNMENTAL AGENCIES. ALTHOUGH CLOSE COOPERATION SHOULD EXIST, THE PUBLIC SECTOR MUST STAY UNATTACHED IN ORDER TO SERVE THE PUBLIC INTEREST.



TOMALES BAY HAS THE POTENTIAL TO BE A KEY VISITOR DESTINATION



MARIN OFFERS THE REQUIRED NATURAL RESOURCES CLOSE TO
A READY MADE MARKET



THE WEEKEND

BASED ON RESPONSES TO TWO SUNDAY SURVEYS ON THE GOLDEN GATE BRIDGE, THE TYPICAL WEEKEND VISIT TO MARIN COUNTY HAS THE FOLLOWING CHARACTERISTICS

VISITOR TO MARIN 1969 - 1970

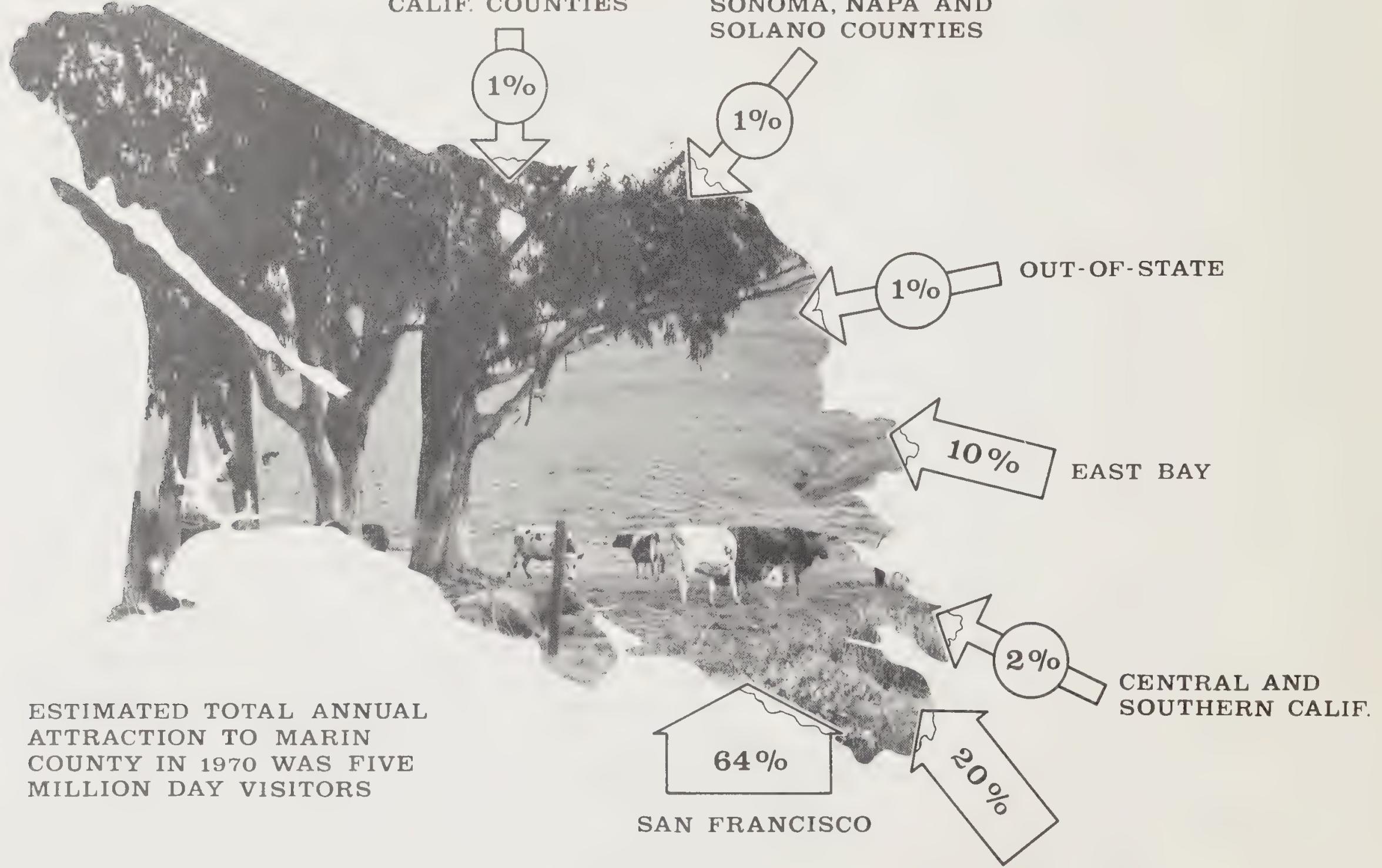
• • • • • • •
THE TRIP IS MADE BY A PAIR OF ADULTS (ONLY 28% OF THE VEHICLES HAD CHILDREN ALONG) WHO DROVE OVER FOR THE DAY (89% FALL, 74% SUMMER) TO A RECREATION DESTINATION (62-64%) IN A CONVENTIONAL AUTO. MOST OF THE TRAVELERS LIVE IN SAN FRANCISCO AND THE PENINSULA, (71 TO 80%) AND THE MOST SIGNIFICANT SINGLE PURPOSE (29-31%) FOR COMING OVER IS TO

VISIT FRIENDS OR RELATIVES

THE MAJOR SECONDARY ACTIVITIES ON A VISIT ARE

PLEASURE DRIVING AND DINING OUT

MOST DINING OUT OCCURS IN SAUSALITO AND TIBURON WHERE IT IS COMBINED WITH SHOPPING AND BROWSING. THUS, THESE TWO SCENIC VILLAGES AT TRACT 30 TO 34% OF THE TRIPS TO MARIN, WHILE THE AREAS NOTED FOR OUTDOOR RECREATION ONLY DRAW 27 TO 33% OF THE TOTAL TRIPS. PERHAPS BECAUSE OF FOGGY WEATHER IN THE SUMMER, VISITATION WAS HIGHER IN SOME OUTDOOR AREAS (POINT REYES, MUIR WOODS, MOUNT TAMALPAIS) IN THE FALL. VISITATION HAS SOME SEASONAL VARIATIONS, BUT REMAINS HIGH THROUGHOUT THE YEAR. THE 54% OF THE SURVEY RESPONDENTS WHO CAME TO MARIN AT LEAST ONE WEEKEND PER MONTH IN WINTER GREW TO 73% IN THE SUMMER. THIS IS ONLY A VARIATION OF 19% AND SINCE A MAJORITY COME FREQUENTLY IN BOTH SEASONS, IT WOULD SEEM THAT ENTERPRISES CATERING TO THE MARIN VISITOR WOULD NOT SUFFER FROM THE PROBLEMS OF SEASONALITY THAT AFFECT OTHER VISITOR DESTINATION AREAS.



SOURCE: GOLDEN GATE BRIDGE, HIGHWAY & TRANSPORTATION DISTRICT
MARIN COUNTY PLANNING DEPARTMENT



MOST OF MARIN'S VISITORS LIVE IN SAN FRANCISCO AND VISIT THE TWO SCENIC VILLAGES OF SAUSALITO AND TIBURON

RECOMMENDATIONS OF THE CITY-COUNTY PLANNING COUNCIL

- THAT A POSITIVE APPROACH TO VISITOR ENTERPRISE AND ECONOMIC DEVELOPMENT SHOULD BE IMPLEMENTED BY COUNTY GOVERNMENT SO THAT MARIN CAN BENEFIT FROM THE GROWTH IN VISITATION TO ITS ATTRACTIONS.
- THAT THE NATIONAL PARK SERVICE BE URGED TO COMPLETE ITS MASTER PLAN FOR THE POINT REYES NATIONAL SEASHORE AND LET ITS CONTENTS BE KNOWN PUBLICALLY AS EARLY AS POSSIBLE.

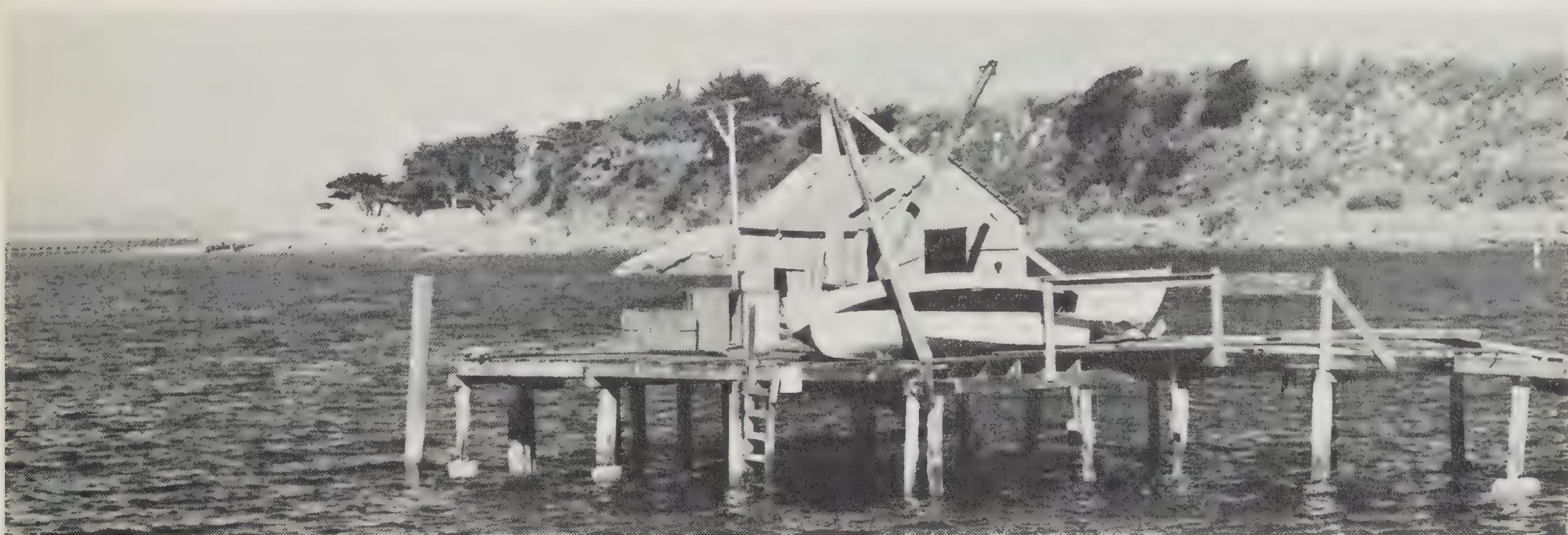
Adopted by the City-County Planning Council February & March 1971

RECOMMENDATIONS OF THE VISITOR ENTERPRISE AND ECONOMIC DEVELOPMENT COMMITTEE

- THE POSITIVE APPROACH TO VISITOR ENTERPRISE DEVELOPMENT AS OUTLINED BY THE CONSULTANT SHOULD BE IMPLEMENTED BY COUNTY GOVERNMENT SO THAT MARIN CAN BENEFIT FROM THE INEVITABLE GROWTH IN VISITATION TO ITS ATTRACTIONS.
- THE BOARD OF SUPERVISORS SHOULD CHARGE THE COUNTY PLANNING DEPARTMENT WITH THE TASK OF KEEPING THE INFORMATION CONTAINED IN THIS PROJECT UP TO DATE.
- THE COUNTY SHOULD DESIGNATE A SPECIAL PLANNER IN THE PLANNING DEPARTMENT TO COORDINATE APPLICATIONS FOR VISITOR ORIENTED DEVELOPMENTS.
- THE PLANNING DEPARTMENT BUDGET SHOULD BE AUGMENTED BY THE COST OF AT LEAST 1/2 OF A PROFESSIONAL PLANNER QUALIFIED TO CARRY OUT THE UPDATING AND COORDINATION FUNCTIONS.
- THE NATIONAL PARK SERVICE SHOULD COMPLETE ITS MASTER PLAN FOR THE POINT REYES NATIONAL SEASHORE AND LET ITS CONTENTS BE PUBLICALLY KNOWN AS SOON AS POSSIBLE.

PLANNING STAFF RECOMMENDATIONS FOR ACHIEVEMENT OF VISITOR ENTERPRISE GOALS

- EMPHASIZE VISITOR ENTERPRISE DEVELOPMENT IN WEST MARIN
THE WEST MARIN PLAN HAS A NUMBER OF WEAKNESSES WHICH
OUGHT TO BE AMENDED. THE APPROACH TAKEN TO THE
ESTABLISHMENT OF A TOURIST AND RECREATION INDUSTRY
SEEMS PARTICULARLY QUESTIONABLE. THE WHOLE THRUST
OF THE PLAN IS BASED ON THE DISTRIBUTION OF RESIDENTIAL
DENSITY. THE END RESULT IS A WEST MARIN THAT COULD
WIND UP BEING A SLIGHTLY MORE RUSTIC VERSION OF SUBURBIA,
WITH RURAL-RESORT FACILITIES PERMITTED AS ALTERNATES
TO HOUSING IF THIS "ALTERNATE DEVELOPMENT SHOULD BE
SIMILAR IN SCOPE TO WHAT MIGHT HAVE BEEN ANTICIPATED
IN THE RESIDENTIAL DEVELOPMENT". IF TOURISM IS TO
REALLY MAKE A CONTRIBUTION TO THE COUNTY'S ECONOMIC
IMPROVEMENT, THESE PRIORITIES SHOULD BE REVERSED.
- MINIMIZE THE EARTHQUAKE HAZARDS ON THE SAN ANDREAS
FAULT ZONE BY PROPER REGULATION OF DEVELOPMENT
THE PLACEMENT OF THE BULK OF THE MOTELS, HOTELS AND
OTHER TOURIST FACILITIES ON THE SAN ANDREAS FAULT BY
THE PLAN IS OBJECTIONABLE EVEN IF IT MADE SENSE ECONOM-
ICALLY. THE RECOMMENDATIONS OF THE COUNTY'S JOINT
GEOLOGIC HAZARD STUDY WITH THE STATE DIVISION OF
MINES AND GEOLOGY SHOULD BE USED TO DEVELOP REGULATIONS
WHICH WILL MINIMIZE RISKS TO PEOPLE AND PROPERTY IN THE
FAULT AREAS.



THE ECOLOGY OF BEAUTIFUL TOMALES BAY DESERVES MORE PROTECTION.



● PROTECT THE ECOLOGY OF TOMALES BAY
IN CONSIDERATION OF THE IMPACT OF DEVELOPMENT AROUND
TOMALES BAY, THE PLAN HAS THE SAME SORT OF LIMITATIONS
THAT THE BOLINAS-STINSON BEACH PLAN HAS REGARDING THE
ECOLOGICAL STRATEGY THAT SHOULD BE FOLLOWED TO PRESERVE
BOLINAS LAGOON. TOMALES BAY NOT ONLY HAS SIMILAR
PROBLEMS OF SILTATION AND FISH AND WILDLIFE CONSERVATION,
BUT THE CONSULTANTS FOR THE COUNTY MASTER PLAN OF
SEWAGE DISPOSAL POINTED OUT THAT AVOIDANCE OF POLLUTION
PROBLEMS WILL BE DIFFICULT THERE BECAUSE THE BAY CON-
SISTS OF SHALLOW WATERS WITH POOR FLUSHING ACTION.
DEVELOPMENT PLANS FOR THE AREA SHOULD BE MADE WITH
THE AIM OF MEETING ADEQUATE POLLUTION CONTROL
STANDARDS.

TOMALES BAY . . .
BEAUTIFUL SCENERY, FRAGILE ECOLOGY

STINSON BEACH . . .
AUTO CONGESTION HERE HAS ALREADY
REACHED THE SATURATION POINT ON
WARM WEEKENDS

- PROVIDE FOR ALTERNATES TO THE AUTO
IT WILL BE EXCEEDINGLY DIFFICULT TO PRESERVE THE
ATTRACTIVENESS OF THE WEST MARIN AND NATIONAL
SEASHORE ENVIRONMENTS IF ALL FUTURE TRAVEL TO THESE
AREAS IS BY AUTOMOBILE ALONE. THE BALANCED TRANS-
PORTATION POLICY SHOULD BE APPLIED TO RECREATIONAL
TRAVEL DEMAND AS WELL. THE GOLDEN GATE BRIDGE DIS-
TRICT, SHOWING ADMIRABLE FORESIGHT, HAS INSTRUCTED
ITS NAVAL ARCHITECT TO DESIGN ITS FERRY FLEET FOR
SEAGOING SERVICE, SO THAT IT COULD TAKE PASSENGERS
TO POINT REYES AND OTHER OCEAN SHORELINE VISITOR
POINTS. A JOINT FEDERAL - STATE AND LOCAL EFFORT IS
NEEDED TO PROTECT THE WEST MARIN ENVIRONMENT FROM
UNLIMITED AUTO TRAFFIC BY PROVIDING TRANSIT ALTER-
NATIVES.





UNIFY THE MARIN SHORELINE WITH A NATIONAL PARKWAY. A NATIONAL PARKWAY* IS JUSTIFIED AND NECESSARY BETWEEN THE GOLDEN GATE BRIDGE AND THE NATIONAL SEASHORE. IT WOULD BECOME PARTICULARLY ESSENTIAL IF THE PROPOSED GOLDEN GATE NATIONAL RECREATION AREA BECOMES A REALITY. IT WOULD BE MOST DESIRABLE IF THE PARKWAY COULD ACT AS AN ENVIRONMENTAL CORRIDOR BETWEEN THE GOLDEN GATE HEADLANDS, TAMALPAIS STATE PARK, BOLINAS RIDGE, SAMUEL P. TAYLOR PARK, AND THE NATIONAL SEASHORE. (SEE FIGURE II WHICH IS A DETAILED CONCEPTUAL MAP SHOWING HOW IT COULD BE INTEGRATED WITH OLEMA, THE NATIONAL SEASHORE ENTRANCE AND SIR FRANCIS DRAKE BOULEVARD TO PERMIT OPTIMUM DEVELOPMENT OF A VISITOR DESTINATION AREA.)

*A national parkway is defined as "a federally owned elongated park featuring a road designed for pleasure travel and embracing scenic, recreational, or historic features of national significance. Access from adjoining properties is limited and commercial traffic is not permitted". There are over 1,100 miles of parkway in the eastern U.S. California, the most populous state in the Union, has zero miles. It's time to ask where's ours!

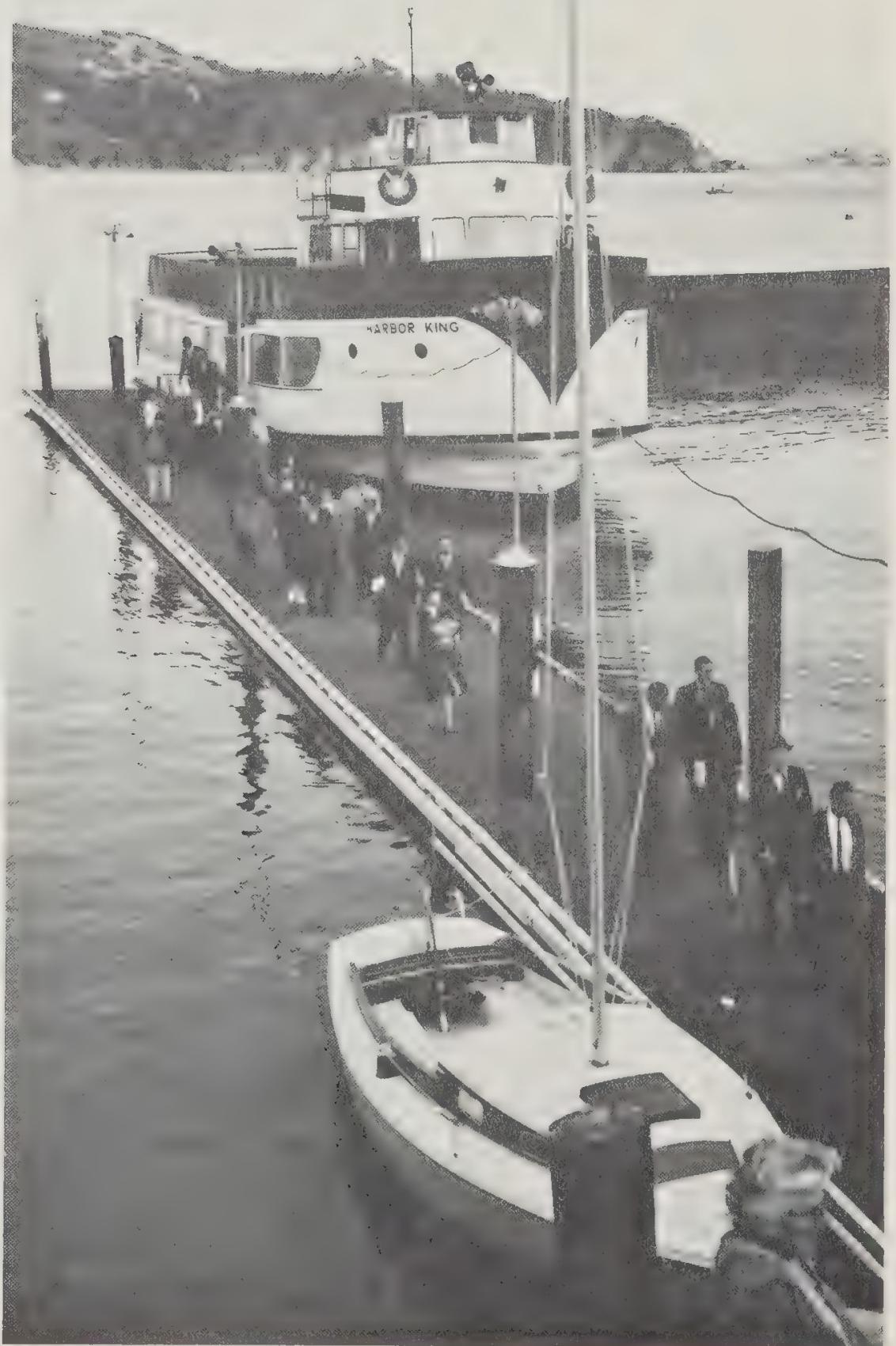
PROPOSED VISITOR ENTERPRISE DEVELOPMENT WITH NATIONAL PARKWAY AT OLEMA.

figure 2

FERRIES - A DELIGHTFUL ALTERNATIVE TO THE AUTO

- ESTABLISH NEW MEANS FOR NEW PARKS AND OPEN SPACE FINANCING
FINANCING THE ADDITIONAL RECREATIONAL USE AREAS AND OPEN SPACES NEEDED TO PRESERVE WEST MARIN'S ENVIRONMENT COULD COME FROM A NUMBER OF INNOVATIONS. TWO MOST GENERALLY DISCUSSED ARE:

1 A REGIONAL PARK DISTRICT SIMILAR TO THAT OF EAST BAY'S WHICH INCLUDES CONTRA COSTA AND ALAMEDA COUNTIES. THIS COULD BEGIN AS AN ALL MARIN DISTRICT AND EXPAND LATER ON TO INCLUDE SAN FRANCISCO, SAN MATEO AND SONOMA WHICH ARE THE PRINCIPAL GENERATORS OF DAY VISIT TRAFFIC TO MARIN. WHILE A REGIONAL PARK DISTRICT HAS BEEN FAIRLY EFFECTIVE IN GETTING A MEANINGFUL PARK SYSTEM PUT TOGETHER ACROSS THE BAY, IT DOES REQUIRE APPROVAL OF THE VOTERS OF MARIN FOR ANOTHER SPECIAL FUNCTION GOVERNMENT FED BY THE PROPERTY TAX.





SOME WAY MUST BE FOUND FOR NON RESIDENT DAY VISITORS TO PAY THEIR SHARE OF THE COSTS FOR THE PLACES THEY COME TO ENJOY

2 SPECIAL HIGHER TOLL RATES ON THE GOLDEN GATE BRIDGE FOR WEEKEND TRAVEL, WHICH IS PREDOMINANTLY RECREATION ORIENTED*, WOULD PROVIDE A USER FINANCED SOURCE OF REVENUE FOR PARKS AND OPEN SPACE. IT COULD BE DISTRIBUTED TO THE MEMBER COUNTIES OF THE BRIDGE DISTRICT ON THE BASIS OF THE DISTRIBUTION OF VEHICLES VISITING THEM AS DETERMINED BY A SURVEY OF THE TYPE CONDUCTED BY THE BRIDGE DISTRICT IN 1969-70. WHILE THIS TYPE OF A RECREATION TAX WOULD PROBABLY REQUIRE SPECIAL STATE LEGISLATION, IT MAY BE THE ONLY EQUITABLE WAY FOR DAY VISITORS TO PAY THEIR SHARE FOR THE PRESERVATION OF PLACES THEY TRAVEL TO SEE UNTIL SOME FORM OF REGIONAL GOVERNMENT TAKES CARE OF THIS NEED.

3 A COMBINATION OF BOTH OF THESE IDEAS MIGHT BE THE MOST FEASIBLE APPROACH FROM A NUMBER OF STANDARD POINTS.

* An example of the need for a financial transfusion to local park and open space areas used by non-resident day visitors are the communities of Bolinas and Stinson Beach. Saturation conditions are encountered at the state and county beaches there on a number of warm weekends. Nevertheless there were almost as many Golden Gate Bridge Survey respondents who had gone there reporting hiking and picnicing as their primary trip purposes as there were swimming and beach visits. In many cases this means trespassing for many of the hiking trails and most of the non-beach picnic areas are on private property.



POINT REYES NATIONAL SEASHORE ATTRACTS HIKERS, NATURE LOVERS AND SIGHTSEERS TO THE LONELY SANDS WHERE FRANCIS DRAKE STOPPED ON HIS VOYAGE ROUND THE WORLD IN 1579

APPENDIX 1

LAND AREA REQUIRED FOR IMPLEMENTATION OF THE POSITIVE VISITOR ENTERPRISE POLICY IN MARIN COUNTY

TYPE OF FACILITY	RECOMMENDED UNITS			RECOMMENDED DENSITY (units per acre)		AREA REQUIRED		
	Total	West Marin	East Marin	West Marin	East Marin	Total	West Marin	East Marin
RESORT MOTELS (rooms)	3,000	2,250	750	15	45	167	150	17
RECREATIONAL VEHICLE SPACES	1,000	1,000	--	8	--	125-150	125-150	--
GOLF COURSES (holes)	72	72	--	0.07	--	520	520	--
MARINA SLIPS	2,000	500	1,500	100*	100*	20*	5*	15*
RESTAURANTS (square feet)	292,000	219,000	73,000	7,487**	7,487**	39	26	10
STORES AND SHOPS (square feet)	141,250	106,000	35,250	8,828**	8,828**	16	12	4
GAS STATIONS	27	20	7	1	1	27	20	7
HOUSING FOR NEW EMPLOYEES (units)	1,640	1,310	330	6	10	251	218	33
TOTAL	--	--	--	--	--	1,165	1,079	86

* Land side only

** Including parking at a 5-6:1 ratio

Source: Economics Research Associates

APPENDIX 2

PLANNING STAFF CRITIQUE OF CONSULTANT'S RECOMMENDATIONS

MARINA DEVELOPMENT IN EASTERN MARIN: THE BASE FOR THE PROJECTION OF NEW BOAT SLIPS WAS DERIVED FROM A 1962 SURVEY. SINCE THAT TIME AT LEAST 600 OF THE PROJECTED UNITS HAVE BEEN DEVELOPED. AT THE PRESENT TIME ADDITIONAL MARINAS ARE UNDER CONSIDERATION IN SAUSALITO, MILL VALLEY, SAN RAFAEL AND TOMALES BAY. FOR THE FORESEEABLE FUTURE IT APPEARS THAT REASONABLE DEMAND FOR BOAT SLIPS MAY BE SATURATED.

FOUR NEW GOLF COURSES ARE RECOMMENDED FOR WEST MARIN. ADDING THESE TO THE EXISTING FIVE COURSES IN MARIN, WOULD RESULT IN NINE COURSES OR ONE MORE THAN WHAT'S AVAILABLE IN THE MONTEREY-CARMEL AREA--A LONG ESTABLISHED GOLF RESORT AREA. IN VIEW OF THE PROPOSALS FOR LIMITED RESIDENTIAL DEVELOPMENT IN WEST MARIN, PLUS ITS RESTRICTED WINTER USAGE AND RELATIVE INACCESSIBILITY TO URBAN CENTERS IT IS DOUBTFUL IF MORE THAN ONE OR POSSIBLE TWO COURSES COULD BE SUPPORTED THERE.

THE CONSULTANTS PROPOSE HAVING THE COUNTY PLANNING DEPARTMENT "INTERPRET THE ABSTRACT MASTER PLAN INTO A GROUP OF SPECIFIC PROJECTS", BUT "NOT ZONE UNTIL REQUESTED TO DO SO BY A PROSPECTIVE DEVELOPER". THIS LANGUAGE IS UNFORTUNATE FOR IT SEEMS TO SUGGEST TREATING SPECIFIC RESORT SITES AS REDEVELOPMENT AREAS WITH A GOVERNMENTAL AGENCY DOING THE PROJECT PLANNING NORMALLY LEFT TO THE DEVELOPER, SO THAT WHEN A DEVELOPER FINALLY APPEARS HE WILL HAVE NO DIFFICULTY WORKING A PLAN FOR THE SITE THROUGH TO APPROVAL.

A BETTER SOLUTION WOULD BE TO LEAVE THE PROJECT PLANNING TO THE DEVELOPER WHO'S TAKING THE RISKS AND IS PROBABLY MORE AWARE OF CURRENT DEMANDS OF LENDERS, THE MARKET, AND OTHER ECONOMIC DETERMINANTS OF HIS BUSINESS THAN A PLANNING DEPARTMENT. HOWEVER LAND SUITABLE FOR VISITOR ENTERPRISES SHOULD BE PROTECTED FROM PREEMPTION BY LESS BENEFICIAL USES AND PREMATURE FRAGMENTATION OF PROPERTIES THROUGH ZONING DESIGNED FOR THIS PURPOSE. VISITOR ENTERPRISES PROJECTS THEMSELVES SHOULD BE CONTROLLED BY HIGH STANDARDS OF BUILDING AND SITE DESIGN REVIEW THAT ARE REASONABLY FLEXIBLE TOWARD INNOVATION AND HIGH QUALITY. THE PLANNING DEPARTMENT PREPARED A DEVELOPMENT POINT AND BONUS SYSTEM* IN 1968 WHICH SHOULD BE REVIEWED TO ACCOMPLISH THE GOALS OF ACHIEVING HIGH QUALITY VISITOR ENTERPRISE DEVELOPMENT WITH MINIMUM DISRUPTION TO THE NATURAL ENVIRONMENT.

* The development point technique assigns density to each land use category on a sliding scale of points instead of using housing units as the basic unit of density calculation. Thus 2,000 visitor units could not only be accommodated within a master plan's proposal of a desirable intensity of development, but it could be given a favorable impetus as well. Density bonuses for good design, special environmental features, and provision for low and moderate-income housing would provide further incentives for higher quality development which benefits the public.

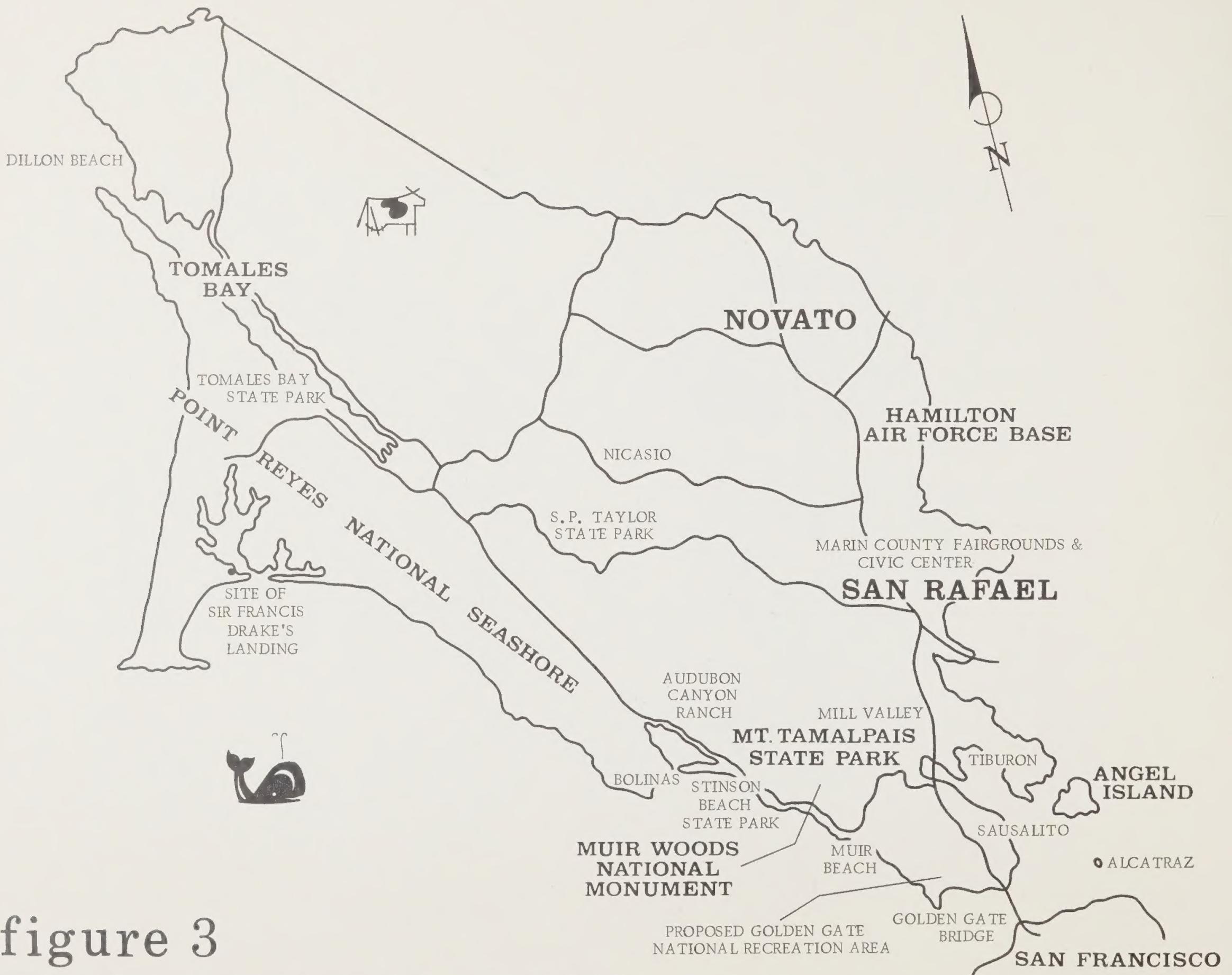


figure 3
VISITOR DESTINATIONS IN MARIN



C124901472

THE MARIN CITY-COUNTY PLANNING COUNCIL VISITOR
ENTERPRISE AND ECONOMIC DEVELOPMENT SUBCOMMITTEE

CARNEY CAMPION, CHAIRMAN
ROBERT GRAVER
LARRY MARKS
GIL MEDEIROS
PHYLLIS PATTERSON
KENT SEYMOUR

GEORGE BARNWELL
HUGH DOUGHERTY
JOSEPH MARSHALL
CARROLL SNYKER
LEON KALIMOS

MARIN COUNTY PLANNING DEPARTMENT STAFF PARTICIPATING
IN THE PREPARATION OF THIS REPORT:

WERNER VON GUNDELL, DIRECTOR
ALBERT SOLNIT, CHIEF ADVANCE PLANNING
ROWLAND DARNELL, PRINCIPAL PLANNER
DELBERT DAVIS, SENIOR PLANNER
GEORGE JOHNSON, GRAPHICS SUPERVISOR
LARRY SMITH, GRAPHICS
FORREST FULTON, GRAPHICS
LINDA DOWNEY, SENIOR TYPIST

ALL PHOTOGRAPHS WERE FURNISHED THROUGH THE
COURTESY OF THE REDWOOD EMPIRE ASSOCIATION.



PREPARED BY MARIN COUNTY PLANNING DEPARTMENT - 1970